

THE SEQ DOMESTIC OVERNIGHT MARKET SNAPSHOT

A MARKET PERSPECTIVE

The profile and trip behaviour of the SEQ self drive, holiday & leisure, short-medium break market.

IMPORTANCE OF THE SEQ MARKET TO BYRON SHIRE

IN 2017

DOMESTIC MARKET IMPORTANCE RANKING



267,000 OVERNIGHT TRIPS TO THE BYRON SHIRE



(36% of domestic overnight visitors)

702,000 VISITOR NIGHTS SPENT IN BYRON SHIRE:



(27% of all domestic nights)

ESTIMATED SPEND IN THE BYRON SHIRE

\$135* MILLION

THIS IS EQUIVALENT TO 1/4 OF BYRON'S TOTAL DOMESTIC OVERNIGHT VISITOR SPEND

TRAVELLER PROFILE



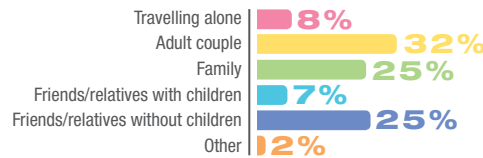
for the year ending December 2017

LENGTH OF TRIP

THE AVERAGE LENGTH OF TRIP TO THE BYRON SHIRE IS

2.65 NIGHTS

TRAVEL PARTY TYPE



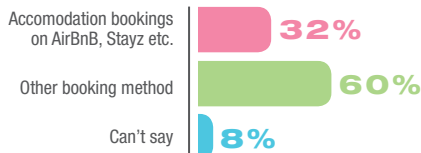
ADULT COUPLES MOST SIGNIFICANT TRAVEL PARTY TYPE

AGE GROUP



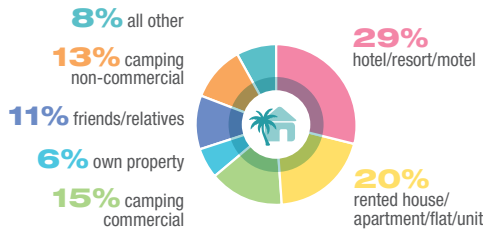
WE APPEAL TO ALL GROUPS

BOOKING METHOD



AIRB'N'B ETC. SLIGHTLY LOWER THAN NATIONAL AVERAGE

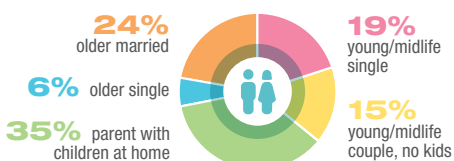
ACCOMMODATION TYPE



HOUSEHOLD INCOME

22% HAVE AN AVERAGE HOUSEHOLD INCOME OVER \$200K

LIFECYCLE



3/4 PART OF A COUPLE / MARRIED

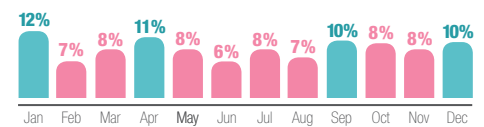
GENDER

2% MORE FEMALES THAN MALES IN 2017

PREVIOUS YEARS SHOWED MORE MALES THAN FEMALES



SEASONALITY



JANUARY, APRIL, SEPTEMBER AND DECEMBER ACCOUNTS FOR 43%

*Assumes expenditures by the SEQ market are the same in Byron as they are in other destinations.

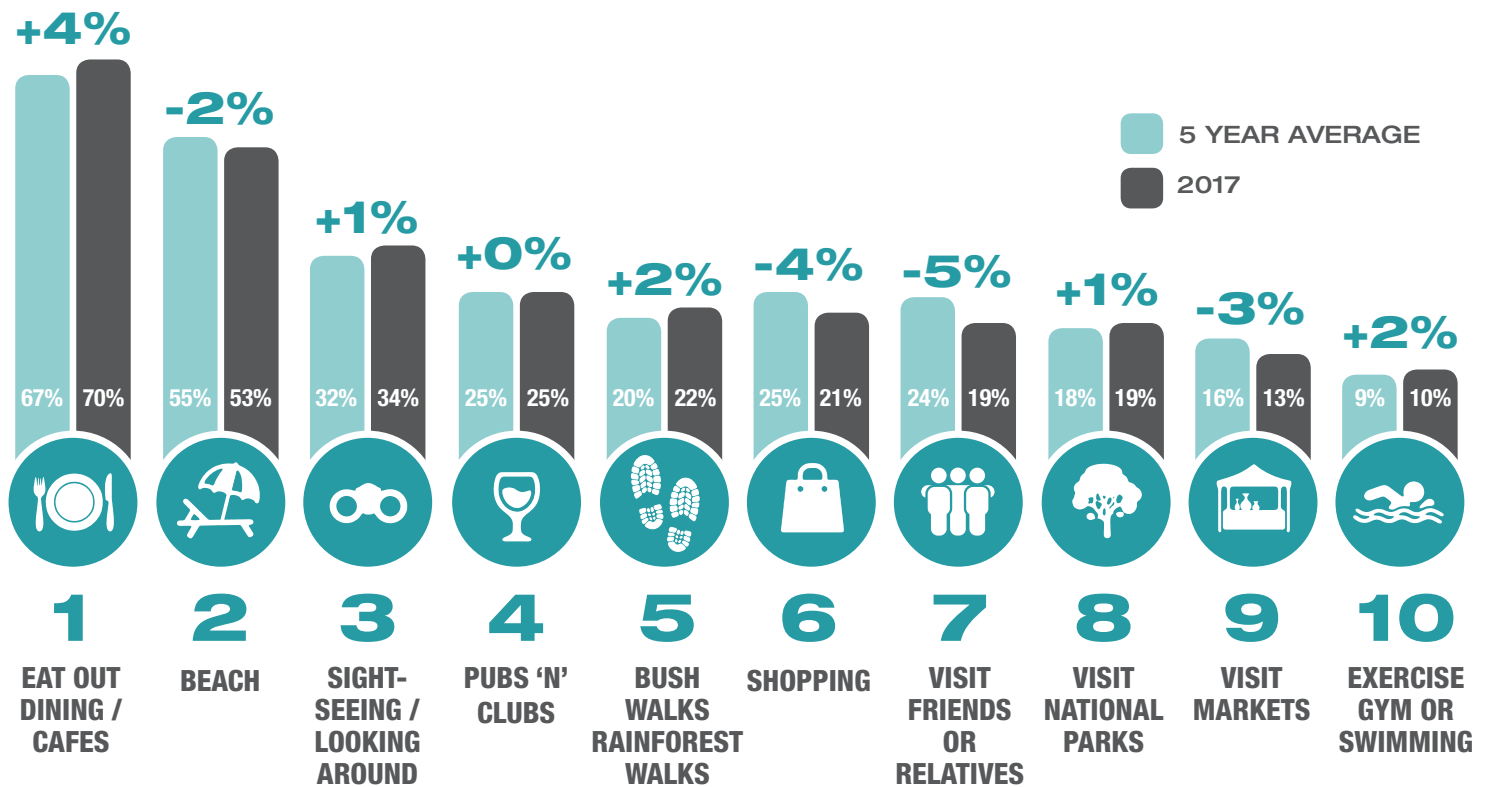
Visitor volume and percentages - Tourism Research Australia (TRA); National Visitor Survey (NVS); Unpublished data extracted from NVS dataset under license. Caution: All estimates are subject to sample survey error.

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TRIP ACTIVITIES

The following tables show the percentage of total trips that included specific activities. This is referred to as the 'participation rate' or 'uptake'.

TOP 10 ACTIVITIES - 2017



WHAT IS THE TOTAL SEQ MARKET SIZE & VALUE

This data represents what the Byron Shire 'captured' of the SEQ overnight holiday short-medium breaks market. Here's the overall size of the market for the year ending December 2017:

FOR THE YEAR ENDING DECEMBER 2017:

3.44
MILLION



TOTAL TRIPS

9.1
MILLION



TOTAL TRIP NIGHTS

\$ 1.8
BILLION



TOTAL SPEND

\$ 511



AVERAGE SPEND PER TRIP:

\$ 193



AVERAGE SPEND PER NIGHT: